

Lenore Morris Law Office

ENDURING POWER OF ATTORNEY (EPOA) QUESTIONNAIRE INSTRUCTIONS

Powers of Attorney let someone look after your property and financial matters if you are incapacitated.

* If you want someone to make personal care, including healthcare, decisions, for you if you are incapacitated, you need to make an *Advance Directive*. The process for an Advance Directive does not require a lawyer. Another option is a *Supported Decision-Making Agreement* for personal care decisions.

To start the EPOA process, please:

- 1) Fill in this questionnaire as fully as possible and return to us, preferably by scan & email to info@lenoremorris.com (and if you are also making a Will, at the same time your completed Will Questionnaire).
- 2) We will then use the information you provide in the questionnaire to produce a draft EPOA that we will send back to you for your review.
- 3) Once you are satisfied with the document, we will set up a time for you to come in and sign (along with your Will).

Please note the questionnaire assumes that only Yukon law applies. If this is not the case, it may be necessary for you to consult a lawyer in another jurisdiction.

Unless you specifically request us to do so, we will not check the information you provide but assume it is correct.

Fees

We charge \$300.00 plus GST to prepare a typical EPOA. If you and your spouse would like matching EPOAs, our fee for preparation of 2 “mirror” EPOAs is \$450.00 plus GST. Our fee includes obtaining your instructions, drafting and editing your EPOA, meeting with you to sign the EPOA, executing Affidavits of Witness and reporting to you.

- If you are making a Will with us at the same time as you make your EPOA, and the documents are of typical complexity, it will cost for 1 Will + 1 EPOA = \$725; or 2 Wills + 2 EPOAs = \$1200.

If you either bring your attorney and alternate with you when you come to our office to sign, or arrange yourself to obtain their signature(s), we will reduce our fee by \$100/\$150.

Thank you! We look forward to working with you!

PART 1 — INFORMATION ABOUT YOU

Name (full):	
Other names you have been known by: (e.g. you go by your middle name, or your name is Margaret but you go by Peggy)	
Address	
Date of birth (month/day/year)	
Marital status (circle one): single - married - cohabitating - divorced - widowed - engaged	
Telephone no. (home or cell):	Telephone no. (work):
Email address:	
<p><b style="background-color: #00FFFF; display: inline-block; padding: 2px;">REAL ESTATE HOLDINGS</p> <p>1st Property</p> <ul style="list-style-type: none"> • In your name? • In spouse/partner's name? • In joint names? <p>Street Address:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Legal Description</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>2nd property (if applicable)</p> <ul style="list-style-type: none"> • In your name? • In spouse/partner's name? • In joint names? <p>Street Address:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Legal Description</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>

PART 2 — YOUR INSTRUCTIONS

ATTORNEY # 1

Who do you want to appoint as your Primary Attorney?
 (“Attorney” in this context means your representative.)

First and last name	
Address	
Phone number	
Email	
Occupation	
Relationship to you	

ATTORNEY # 2

Who (if anyone) do you want to appoint as your Alternate Attorney?

First and last names	
Address	
Phone number	
Email	
Occupation	
Relationship to you	

Do you want to compensate your Attorney(s)? And if so, how much?

(Acting as a Power of Attorney can be a lot of work. You should consider compensating yours if they may be required to act on an ongoing basis for an extended period of time. Consider potential monthly obligations) _____

COMING INTO EFFECT

When do you want the Enduring Power of Attorney to come into effect?

_____ ***If and when you are unable to manage your financial affairs due to mental or physical infirmity***

OR

_____ ***Immediately*** (Please briefly explain why: _____)